



# Merging Client Information in imMTrax

imMTrax User Role Training

Montana Department of Health  
and Human Services  
Public Health and Safety  
Division  
April 2014

# Merging Client Information, Goals and Implications

**The primary goal of merging client records is to create one current and complete record for each individual client.**

Two (or more) client records may need to be merged if each record reflects or includes:

- Changes in client last name (change in marital status, adoption)
- Data Entry variations
- Data Entry errors

# Merging Client Information, Practices for a Well-Maintained imMTrax

- **Make evaluating your “merge queue” a routine task**

Merging clients on a routine basis reduces the overall number of records pending evaluation and helps to keep your client's information accurate and up-to-date!

- **Do your research**

When seeing information that is either outdated or in question, you may need to refer to your records to make the best selection.

- **Use your best judgment**

- **If you are not 100% sure, DO NOT MERGE**



# Merging Client Information, Navigating to the Merge Functions

## Clients

manage client  
last client  
mass immunization  
nip (nv) validation report  
**merge clients**  
unmerge clients  
client summary view

**imMTrax**  
Montana  
Immunization  
Information  
System

TEST v13.4.2.1.1

Org: Bozeman Deaconess • Site: Bridger Internal Medicine/ • User: Michelle Funchess

**Announcements:**

NEW 11/19/2013 ~ [test and specifications](#)  
NEW 11/19/2013 ~ [test announcement - hyperlink test](#)  
NEW 11/19/2013 ~ [more test announcements](#)

**Immunization Coverage:**

[No Clients available between 19 months and 35 months with a primary association](#)

**Vaccine Order/Transfer Notification...**

Type	Order Date	Approved Date	Status
Currently, there are no order or transfer notifications.			

**Active Inventory that is Going to Expire ...**

Site Name	Trade Name	Lot Number	On Hand	Public	Exp Date
No vaccines are currently set to expire.					

**Inventory that is Running Low by Vaccine Group ...**

Vaccine Group	Quantity On Hand	Public
No vaccine groups have a low inventory.		

**Inventory that is Running Low by Trade Name ...**

Trade Name	Quantity On Hand	Public
No trade names have a low inventory.		

**Release Notes:**

NEW 05/22/2015 ~ [Release Version 1.1.1](#) Josh Release Notes Test

**resources on the web:** [imMTrax Informational Page](#)  
Click above for additional imMTrax user resources

**upcoming events:**  
Currently, there are no events listed.

# Merging Client Information, Navigating to the Merge Functions

Select Clients to Merge...

View by Client Id...

\*Client Id 1  \*Client Id 2  Client Id 3

Possible Duplicates, Filter by...

Date:   or Job Id:

Possible Duplicate Clients...

Index	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	Next
Job Id	Exchange Date	Client Id	Last Name	First Name	Middle	Birth Date																					
156025	03/16/2014	3400659				'1995	<input type="button" value="View"/>																				
144503		3991585				'1945	<input type="button" value="View"/>																				
144472		3819170				'1961	<input type="button" value="View"/>																				
144503		3949040				'1963	<input type="button" value="View"/>																				
153223		3960254				'2012	<input type="button" value="View"/>																				
143963		3815759				'1970	<input type="button" value="View"/>																				
153223		3919125				'2011	<input type="button" value="View"/>																				
144472		3819278				'1930	<input type="button" value="View"/>																				
144503		3949535				'1981	<input type="button" value="View"/>																				
144503		3815897				'1968	<input type="button" value="View"/>																				
143943		3446190				'2004	<input type="button" value="View"/>																				
144788	12/18/2013	3877710				'2010	<input type="button" value="View"/>																				
153679	02/10/2014	3201408				'1996	<input type="button" value="View"/>																				
153428		4273970				'2010	<input type="button" value="View"/>																				
153283	01/24/2014	4273972				'2001	<input type="button" value="View"/>																				
153283	01/24/2014	4273971				'2005	<input type="button" value="View"/>																				
143964		3401698				'1996	<input type="button" value="View"/>																				
144503		3490272				'1983	<input type="button" value="View"/>																				
156764	04/03/2014	3949626				'1986	<input type="button" value="View"/>																				

Merge by imMTrax ID

Merge by selection from  
your “merge queue”

# Merging Client Information, Merging by Queue Selection

Option 1  
Merge by selection  
from your “merge  
queue”

Select Clients to Merge...

View by Client Id...

\*Client Id 1  \*Client Id 2  Client Id 3

Possible Duplicates, Filter by...

Date:

or

Job Id:

Possible Duplicate Clients...

Index	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	Next
Job Id	Exchange Date	Client Id	Last Name	First Name	Middle	Birth Date																					
156025	03/16/2014	3400659				'1995	<input type="button" value="View"/>																				
144503		3991585				'1945	<input type="button" value="View"/>																				
144472		3819170				'196	<input type="button" value="View"/>																				
144503		3949040				'1963	<input type="button" value="View"/>																				
153223		3960254				'2012	<input type="button" value="View"/>																				
143963		3815759				'1970	<input type="button" value="View"/>																				
153223		3919125				'2011	<input type="button" value="View"/>																				
144472		3819278				'1930	<input type="button" value="View"/>																				
144503		3949535				'1981	<input type="button" value="View"/>																				
144503		3815897				'1968	<input type="button" value="View"/>																				
143943		3446190				'2004	<input type="button" value="View"/>																				
144788	12/18/2013	3877710				'2010	<input type="button" value="View"/>																				
153679	02/10/2014	3201408				'1996	<input type="button" value="View"/>																				
153428		4273970				'2010	<input type="button" value="View"/>																				
153283	01/24/2014	4273972				'2001	<input type="button" value="View"/>																				
153283	01/24/2014	4273971				'2005	<input type="button" value="View"/>																				
143964		3401698				'1996	<input type="button" value="View"/>																				
144503		3490272				'1983	<input type="button" value="View"/>																				
156764	04/03/2014	3949626				'1986	<input type="button" value="View"/>																				

Select *View* on the  
client record  
you'd like to  
evaluate for  
merging

# Merging Client Information, Merging by imMTrax ID

## Option 2

**Client Search Criteria**

*Last Name\**  *SSN*  -  -

*First Name\**  *Phone*  -  -

*Birth Date\**   *Chart#*

*Mother's First Name*  *imMTrax ID*

*Mother's Maiden Last*  *Organization ID*

*Medical Home Association*

\* Fields displayed in *italics* are required for adding new patients.

**Possible Matches: 2**

Index	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Last Name	First Name	Middle Name	imMTrax ID	Birth Date	Chart #	Mother's Maiden First	Mother's Maiden Last	Gender																		
<a href="#">SOUP</a>	TOMATO		4287538	01/01/2009		POTATO		M																		
<a href="#">SOUP</a>	TOMATO		4287672	01/01/2009		POTATO		M																		

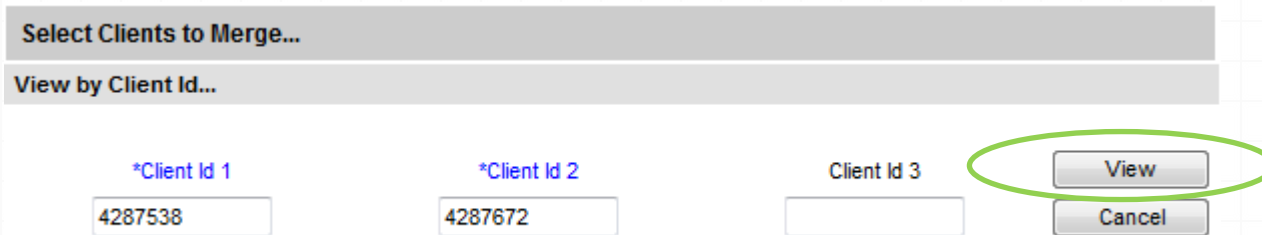
If you run into two (or more) clients in imMTrax that you believe are the same, take note of the imMTrax ID to evaluate for merging.

# Merging Client Information, Merging by imMTrax ID

## Option 2

Return to your merge functions and enter imMTrax IDs.

Select *View*.



Select Clients to Merge...

View by Client Id...

\*Client Id 1

4287538

\*Client Id 2

4287672

Client Id 3

View

Cancel



# Merging Client Information, Evaluating for Records Merging

**Merge Clients...**

Merge clients into one client....

Clients are unique....

Return to the Previous Screen....

**Select details to merge...**

Client #	4287538	4287672
SELECT:	<input type="button" value="All"/> <input type="button" value="None"/>	<input type="button" value="All"/> <input type="button" value="None"/>
Organization Client ID:	<input type="radio"/>	<input type="radio"/>
Active Medicaid:	<input type="radio"/>	<input type="radio"/>
Site:	<input type="radio"/> Richland County Health Department	<input type="radio"/> BC- Miles City
Primary Care Provider:	<input type="radio"/> KARANJAI, RAJOHN	<input type="radio"/> , Not Associated
Medical Home Association:	<input type="radio"/> Secondary	<input type="radio"/> Primary
Chart Number:	<input type="radio"/>	<input type="radio"/>
Tracking Schedule:	<input type="radio"/> ACIP	<input type="radio"/> ACIP
SSN:	<input type="radio"/>	<input type="radio"/>
Last Name:	<input type="radio"/> SOUP	<input type="radio"/> SOUP
First Name:	<input type="radio"/> TOMATO	<input type="radio"/> TOMATO
Middle Name:	<input type="radio"/> ARCHIBALD	<input type="radio"/>
Name Suffix:	<input type="radio"/>	<input type="radio"/>
Date of Birth:	<input type="radio"/> 01/01/2009	<input type="radio"/> 01/01/2009
Birth Certificate #:	<input type="radio"/>	<input type="radio"/>
Date of Death:	<input type="radio"/>	<input type="radio"/>
Death Certificate #:	<input type="radio"/>	<input type="radio"/>
Gender:	<input type="radio"/> MALE	<input type="radio"/> MALE
Race:	<input type="radio"/>	<input type="radio"/> Unknown
Ethnicity:	<input type="radio"/>	<input type="radio"/> Not Hispanic or Latino
Mother's First Name:	<input type="radio"/> POTATO	<input type="radio"/> POTATO
Mother's Maiden Name:	<input type="radio"/>	<input type="radio"/>
School:	<input type="radio"/>	<input type="radio"/>
County:	<input type="radio"/> BIG HORN	<input type="radio"/> LEWIS & CLARK

Take a moment to look at the clients in question, scroll down and look at all the information given.



Don't continue to merge if you aren't confident the clients are the same!

# Merging Client Information

Rule: If it's blue, it must be selected!!

Information uploaded from Vital Statistics

Date of Birth:	<input checked="" type="radio"/> 03/27/2013	<input type="radio"/> 03/27/2013
Birth Certificate #:	<input checked="" type="radio"/> 00 <input type="text" value="98"/>	<input type="radio"/>

Immunization administered and deducted from imMTrax inventory

06/28/2005	<input checked="" type="checkbox"/> DTP/aP ( / U1342DA / public) Flathead City County Health Department
	<input checked="" type="checkbox"/> MMR ( / 0991P / public) Flathead City County Health Department
	<input checked="" type="checkbox"/> Polio ( / X1244-2 / public) Flathead City County Health Department

# Merging Client Information

Select details to merge...		
Client #	4287538	4287672
SELECT:	<input checked="" type="radio"/> All <input type="radio"/> None	<input type="radio"/> All <input type="radio"/> None
Organization Client ID:	<input checked="" type="radio"/>	<input type="radio"/>
Active Medicaid:	<input checked="" type="radio"/>	<input type="radio"/>
Site:	<input checked="" type="radio"/> Richland County Health Department	<input type="radio"/> BC- Miles City
Primary Care Provider:	<input checked="" type="radio"/> KARANJAI, RAJOHN	<input type="radio"/> , Not Associated
Medical Home Association:	<input checked="" type="radio"/> Secondary	<input type="radio"/> Primary
Chart Number:	<input checked="" type="radio"/>	<input type="radio"/>
Tracking Schedule:	<input checked="" type="radio"/> ACIP	<input type="radio"/> ACIP
SSN:	<input checked="" type="radio"/>	<input type="radio"/>
Last Name:	<input checked="" type="radio"/> SOUP	<input type="radio"/> SOUP
First Name:	<input checked="" type="radio"/> TOMATO	<input type="radio"/> TOMATO
Middle Name:	<input checked="" type="radio"/> ARCHIBALD	<input type="radio"/>
Name Suffix:	<input checked="" type="radio"/>	<input type="radio"/>
Date of Birth:	<input checked="" type="radio"/> 01/01/2009	<input type="radio"/> 01/01/2009
Birth Certificate #:	<input checked="" type="radio"/>	<input type="radio"/>
Date of Death:	<input checked="" type="radio"/>	<input type="radio"/>
Death Certificate #:	<input checked="" type="radio"/>	<input type="radio"/>
Gender:	<input checked="" type="radio"/> MALE	<input type="radio"/> MALE
Race:	<input checked="" type="radio"/>	<input type="radio"/> Unknown
Ethnicity:	<input checked="" type="radio"/>	<input type="radio"/> Not Hispanic or Latino
Mother's First Name:	<input checked="" type="radio"/> POTATO	<input type="radio"/> POTATO
Mother's Maiden Name:	<input checked="" type="radio"/>	<input type="radio"/>
School:	<input checked="" type="radio"/>	<input type="radio"/>
County:	<input checked="" type="radio"/> BIG HORN	<input type="radio"/> LEWIS & CLARK

Select *All* on one of the records being evaluated.

You will be toggling between the records, but this will allow you to have an initial selection before beginning.

# Merging Client Information

Select details to merge...		
Client #	4287538	4287672
SELECT:	<input type="button" value="All"/> <input type="button" value="None"/>	<input type="button" value="All"/> <input type="button" value="None"/>
Organization Client ID:	<input checked="" type="radio"/>	<input type="radio"/>
Active Medicaid:	<input checked="" type="radio"/>	<input type="radio"/>
Site:	<input checked="" type="radio"/> Richland County Health Department	<input type="radio"/> BC- Miles City
Primary Care Provider:	<input checked="" type="radio"/> KARANJAI, RAJOHN	<input type="radio"/> , Not Associated
Medical Home Association:	<input checked="" type="radio"/> Secondary	<input type="radio"/> Primary
Chart Number:	<input checked="" type="radio"/>	<input type="radio"/>
Tracking Schedule:	<input checked="" type="radio"/> ACIP	<input type="radio"/> ACIP
SSN:	<input checked="" type="radio"/>	<input type="radio"/>
Last Name:	<input checked="" type="radio"/> SOUP	<input type="radio"/> SOUP
First Name:	<input checked="" type="radio"/> TOMATO	<input type="radio"/> TOMATO
Middle Name:	<input checked="" type="radio"/> ARCHIBALD	<input type="radio"/>
Name Suffix:	<input checked="" type="radio"/>	<input type="radio"/>
Date of Birth:	<input checked="" type="radio"/> 01/01/2009	<input type="radio"/> 01/01/2009
Birth Certificate #:	<input checked="" type="radio"/>	<input type="radio"/>
Date of Death:	<input checked="" type="radio"/>	<input type="radio"/>
Death Certificate #:	<input checked="" type="radio"/>	<input type="radio"/>
Gender:	<input checked="" type="radio"/> MALE	<input type="radio"/> MALE
Race:	<input type="radio"/>	<input checked="" type="radio"/> Unknown
Ethnicity:	<input type="radio"/>	<input checked="" type="radio"/> Not Hispanic or Latino
Mother's First Name:	<input checked="" type="radio"/> POTATO	<input type="radio"/> POTATO
Mother's Maiden Name:	<input checked="" type="radio"/>	<input type="radio"/>

Use your best judgment to select the information that will result in the most complete record

Select populated options over those that are blank\*

\*Exception:

Rarely, you may see a field in question that is populated with information that is invalid

example: phone number saved in the Mother's Maiden Name field

# Merging Client Information

School:	<input checked="" type="radio"/>	<input type="radio"/>
County:	<input checked="" type="radio"/> YELLOWSTONE	<input type="radio"/> YELLOWSTONE
Immunization Contact Allowed:	<input type="radio"/>	<input checked="" type="radio"/> Yes
OMS Contact Allowed:	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes
Opt Out:	<input checked="" type="radio"/> No	<input type="radio"/> Unknown
Birth County:	<input checked="" type="radio"/>	<input type="radio"/>
Birth State:	<input checked="" type="radio"/>	<input type="radio"/>
Birth Country:	<input checked="" type="radio"/>	<input type="radio"/>
Multiple Births:	<input checked="" type="radio"/>	<input type="radio"/>
EPSDT Eligible:	<input checked="" type="radio"/>	<input type="radio"/>
Eligibilities		
	<input type="radio"/> Unknown or Undetermined:	<input checked="" type="radio"/> Not Eligible:
External Organization Ids		
Cascade County Health Department	<input checked="" type="radio"/> 1592237	<input type="radio"/>
Rocky Boy Clinic	<input type="radio"/>	<input checked="" type="radio"/> 454810005381
Insurers		
No Insurers were found...		

Select Yes over *No*, *Unknown* or blank options

Select *No* over *Unknown* or blank options

# Merging Client Information

Multiple selections can be made in the Responsible People section.

Responsible People	
<input checked="" type="checkbox"/> Primary Unknown POTATO SOUP 5566 Montana Ave Helena, MT 59601	<input checked="" type="checkbox"/> Grandparent GRANDMA SMITH 9876 Ave Q Kathleen, MT 31047
	<input checked="" type="checkbox"/> Primary Parent NOT REAL SMITH 1234 Awesome Way ALLIANCE, MT 44001

# Merging Client Information

Responsible People	
<input checked="" type="checkbox"/> Primary Mother POTATO SOUP 5566 Montana Ave Helena, MT 59601	<input type="checkbox"/> Primary Mother POTATO SOUP 5566 Montana Ave Helena, MT 59601

If your options are identical, choose one only.

Responsible People	
<input type="checkbox"/> Primary Mother POTATO SOUP 5566 Montana Ave Helena, MT 59601 4064444444	<input type="checkbox"/> Primary Unknown POTATO SOUP 5566 Montana Ave Helena, MT 59601

If your options are the same person and same address but one option contains more complete information, select the more complete option.

# Merging Client Information

Contraindications/Events	
	<input type="checkbox"/> Pregnancy of recipient Permanent 04/17/2014

Comments	
	<input type="checkbox"/> Parent/Guardian ID for client is: 000000000081491 Temporary

Options labeled as *Temporary* may be outdated. Use your best judgment to determine selections

Options labeled as *Permanent* should be selected unless determined to be no longer applicable or appropriate



# Merging Client Information

If two of the same immunization is listed for the same day,  
select only one.

Example 1

01/07/2011	<input checked="" type="checkbox"/> Influenza
	<input type="checkbox"/> Influenza

Example 2

12/22/2010	<input type="checkbox"/> Hib- Unspecified	<input checked="" type="checkbox"/> DTP/aP - HepB - Polio
	<input type="checkbox"/> Pneumococcal	<input checked="" type="checkbox"/> Hib- Unspecified
	<input type="checkbox"/> DTP/aP - HepB - Polio	<input checked="" type="checkbox"/> Pneumococcal

Example 3

10/24/2008	<input checked="" type="checkbox"/> Hib	
	<input checked="" type="checkbox"/> Pneumococcal	
	<input checked="" type="checkbox"/> DTP/aP - HepB - Polio	
	<input checked="" type="checkbox"/> Rotavirus	
10/24/2008		<input type="checkbox"/> Hib
		<input type="checkbox"/> Pneumococcal
		<input type="checkbox"/> DTP/aP - HepB - Polio
		<input type="checkbox"/> Rotavirus

# Merging Client Information

Reminder:

If it's blue, it must be selected!!

	<input type="checkbox"/> MMR	<input checked="" type="checkbox"/> MMR ( / 1671U / public) Gallatin City County Health Department
04/22/2008	<input type="checkbox"/> Varicella	<input checked="" type="checkbox"/> Varicella ( / 1996U / public) Gallatin City County Health Department
	<input type="checkbox"/> DTP/aP - HepB - Polio	<input checked="" type="checkbox"/> DTP/aP - HepB - Polio ( / AC21B133CA / public) Gallatin City County Health Department

# Merging Client Information

Immunizations	
06/14/1996	<input checked="" type="checkbox"/> HepB
04/19/2001	<input checked="" type="checkbox"/> DTP/aP
	<input type="checkbox"/> DTP/aP
	<input type="checkbox"/> Polio
	<input checked="" type="checkbox"/> MMR
	<input type="checkbox"/> Polio
08/22/2008	<input checked="" type="checkbox"/> Tdap > 7 years
	<input type="checkbox"/> Tdap > 7 years
10/09/2013	<input checked="" type="checkbox"/> Influenza

When the options are the same immunization given on the same day, make only one selection

Select all the immunizations that result in the most complete immunization history

# Merging Client Information

Once you've completed your evaluation and selections,  
quickly review before moving to *Merge*

**Merge Clients...**

Merge clients into one client....

Clients are unique....

Return to the Previous Screen....

Merge

Disassociate

Cancel

Select details to merge...

Client #	4287538	4287672
SELECT:	<input type="button" value="All"/> <input type="button" value="None"/>	<input type="button" value="All"/> <input type="button" value="None"/>
Organization Client ID:	<input checked="" type="radio"/>	<input type="radio"/>
Active Medicaid:	<input checked="" type="radio"/>	<input type="radio"/>
Site:	<input checked="" type="radio"/> Richland County Health Department	<input type="radio"/> BC- Miles City
Primary Care Provider:	<input checked="" type="radio"/> KARANJAI, RAJOHN	<input type="radio"/> , Not Associated
Medical Home Association:	<input checked="" type="radio"/> Secondary	<input type="radio"/> Primary
Chart Number:	<input checked="" type="radio"/>	<input type="radio"/>
Tracking Schedule:	<input checked="" type="radio"/> ACIP	<input type="radio"/> ACIP
SSN:	<input checked="" type="radio"/>	<input type="radio"/>
Last Name:	<input checked="" type="radio"/> SOUP	<input type="radio"/> SOUP
First Name:	<input checked="" type="radio"/> TOMATO	<input type="radio"/> TOMATO
Middle Name:	<input checked="" type="radio"/> ARCHIBALD	<input type="radio"/>

# Disassociating Client Records

**Merge Clients...**

Merge clients into one client....

Clients are unique....

Return to the Previous Screen....

**Select details to merge...**




Client #	4287672	4306215
SELECT:	<input type="button" value="All"/> <input type="button" value="None"/>	<input type="button" value="All"/> <input type="button" value="None"/>
Organization Client ID:	<input type="radio"/>	<input type="radio"/>
Active Medicaid:	<input type="radio"/>	<input type="radio"/>
Site:	<input type="radio"/> BC- Miles City	<input type="radio"/> Bridger Internal Medicine
Primary Care Provider:	<input type="radio"/> , Not Associated	<input type="radio"/> , Not Associated
Medical Home Association:	<input type="radio"/> Primary	<input type="radio"/> Unknown
Chart Number:	<input type="radio"/>	<input type="radio"/>
Tracking Schedule:	<input type="radio"/> ACIP	<input type="radio"/> ACIP
SSN:	<input type="radio"/>	<input type="radio"/>
Last Name:	<input type="radio"/> SOUP	<input type="radio"/> SMITH
First Name:	<input type="radio"/> TOMATO	<input type="radio"/> JOHN
Middle Name:	<input type="radio"/>	<input type="radio"/>
Name Suffix:	<input type="radio"/>	<input type="radio"/>
Date of Birth:	<input type="radio"/> 01/01/2009	<input type="radio"/> 01/01/2008

If it's clear the clients are not the same person, select *Disassociate*.




# Disassociating Client Records

If you have more than two records being evaluated, and both a merge and a disassociation need to occur, begin with the merge by unchecking the records that will need to be disassociated.

Select clients to merge...			
Client #	<input checked="" type="checkbox"/> 4287538	<input checked="" type="checkbox"/> 4287672	<input checked="" type="checkbox"/> 4306215
SELECT:	<input type="button" value="All"/> <input type="button" value="None"/>	<input type="button" value="All"/> <input type="button" value="None"/>	<input type="button" value="All"/> <input type="button" value="None"/>
Organization Client ID:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Active Medicaid:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Site:	<input type="radio"/> Richland County Health Department	<input type="radio"/> BC- Miles City	<input type="radio"/> Bridger Internal Medicine
Primary Care Provider:	<input type="radio"/> KARANJAI, RAJOHN	<input type="radio"/> , Not Associated	<input type="radio"/> , Not Associated
Medical Home Association:	<input type="radio"/> Secondary	<input type="radio"/> Primary	<input type="radio"/> Unknown
Chart Number:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tracking Schedule:	<input type="radio"/> ACIP	<input type="radio"/> ACIP	<input type="radio"/> ACIP
SSN:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Last Name:	<input type="radio"/> SOUP	<input type="radio"/> SOUP	<input type="radio"/> SMITH
First Name:	<input type="radio"/> TOMATO	<input type="radio"/> TOMATO	<input type="radio"/> JOHN
Middle Name:	<input type="radio"/> ARCHIBALD	<input type="radio"/>	<input type="radio"/>
Name Suffix:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Date of Birth:	<input type="radio"/> 01/01/2009	<input type="radio"/> 01/01/2009	<input type="radio"/> 01/01/2008
Birth Certificate #:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Date of Death:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Death Certificate #:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gender:	<input type="radio"/> MALE	<input type="radio"/> MALE	<input type="radio"/> FEMALE



# Disassociating Client Records

Select clients to merge...			
Client #	<input checked="" type="checkbox"/> 4287538	<input checked="" type="checkbox"/> 4287672	<input type="checkbox"/> 4306215
SELECT:	<input type="button" value="All"/> <input type="button" value="None"/>	<input type="button" value="All"/> <input type="button" value="None"/>	<input type="button" value="All"/> <input type="button" value="None"/>
Organization Client ID:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Active Medicaid:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Site:	<input type="radio"/> Richland County Health Department	<input checked="" type="radio"/> BC- Miles City	<input type="radio"/> Bridger Internal Medicine
Primary Care Provider:	<input type="radio"/> KARANJAI, RAJOHN	<input checked="" type="radio"/> , Not Associated	<input type="radio"/> , Not Associated
Medical Home Association:	<input type="radio"/> Secondary	<input checked="" type="radio"/> Primary	<input type="radio"/> Unknown
Chart Number:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Tracking Schedule:	<input type="radio"/> ACIP	<input checked="" type="radio"/> ACIP	<input type="radio"/> ACIP
SSN:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Last Name:	<input type="radio"/> SOUP 	<input checked="" type="radio"/> SOUP 	<input type="radio"/> SMITH 
First Name:	<input type="radio"/> TOMATO	<input checked="" type="radio"/> TOMATO	<input type="radio"/> JOHN
Middle Name:	<input checked="" type="radio"/> ARCHIBALD	<input type="radio"/>	<input type="radio"/>
Name Suffix:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Date of Birth:	<input type="radio"/> 01/01/2009	<input checked="" type="radio"/> 01/01/2009	<input type="radio"/> 01/01/2008
Birth Certificate #:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Date of Death:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Death Certificate #:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Gender:	<input type="radio"/> MALE	<input checked="" type="radio"/> MALE	<input type="radio"/> FEMALE

Once unselected, all options under that record will be grayed out.

# Disassociating Client Records

**Merge Clients...**

Merge selected clients into one client....

Clients are unique....

Return to the Previous Screen....

Merge Selected

Disassociate

Cancel

**Select clients to merge...**

Client #	<input checked="" type="checkbox"/> 4287538	<input checked="" type="checkbox"/> 4287672	<input type="checkbox"/> 4306215
SELECT:	<input type="button" value="All"/> <input type="button" value="None"/>	<input type="button" value="All"/> <input type="button" value="None"/>	<input type="button" value="All"/> <input type="button" value="None"/>
Organization Client ID:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Active Medicaid:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Site:	<input type="radio"/> Richland County Health Department	<input checked="" type="radio"/> BC- Miles City	<input type="radio"/> Bridger Internal Medicine
Primary Care Provider:	<input type="radio"/> KARANJAI, RAJOHN	<input checked="" type="radio"/> , Not Associated	<input type="radio"/> , Not Associated
Medical Home Association:	<input type="radio"/> Secondary	<input checked="" type="radio"/> Primary	<input type="radio"/> Unknown
Chart Number:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Tracking Schedule:	<input type="radio"/> ACIP	<input checked="" type="radio"/> ACIP	<input type="radio"/> ACIP
SSN:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Last Name:	<input type="radio"/> SOUP	<input checked="" type="radio"/> SOUP	<input type="radio"/> SMITH
First Name:	<input type="radio"/> TOMATO	<input checked="" type="radio"/> TOMATO	<input type="radio"/> JOHN
Middle Name:	<input checked="" type="radio"/> ARCHIBALD	<input type="radio"/>	<input type="radio"/>
Name Suffix:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Complete the merging of the clients that are the same and select *Merge Selected*



# Disassociating Client Records

After merging your selected records, you will need to return to your merge queue and reselect one of the clients (i.e Tomato Soup or John Smith)

Now you are ready to *Disassociate*.

**Merge Clients...**

Merge clients into one client....

Clients are unique....

Return to the Previous Screen....

Merge

**Disassociate**

Cancel

**Select details to merge...**

Client #	4287538	4306215
SELECT:	<input type="radio"/> All <input type="radio"/> None	<input type="radio"/> All <input type="radio"/> None
Organization Client ID:	<input type="radio"/>	<input type="radio"/>
Active Medicaid:	<input type="radio"/>	<input type="radio"/>
Site:	<input type="radio"/> Richland County Health Department	<input type="radio"/> Bridger Internal Medicine
Primary Care Provider:	<input type="radio"/> KARANJAI, RAJOHN	<input type="radio"/> , Not Associated
Medical Home Association:	<input type="radio"/> Secondary	<input type="radio"/> Unknown
Chart Number:	<input type="radio"/>	<input type="radio"/>
Tracking Schedule:	<input type="radio"/> ACIP	<input type="radio"/> ACIP
SSN:	<input type="radio"/>	<input type="radio"/>
Last Name:	<input type="radio"/> SOUP	<input type="radio"/> SMITH
First Name:	<input type="radio"/> TOMATO	<input type="radio"/> JOHN
Middle Name:	<input type="radio"/> ARCHIBALD	<input type="radio"/>
Name Suffix:	<input type="radio"/>	<input type="radio"/>
Date of Birth:	<input type="radio"/> 01/01/2009	<input type="radio"/> 01/01/2008
Birth Certificate #:	<input type="radio"/>	<input type="radio"/>
Date of Death:	<input type="radio"/>	<input type="radio"/>
Death Certificate #:	<input type="radio"/>	<input type="radio"/>
Gender:	<input type="radio"/> MALE	<input type="radio"/> FEMALE

# Unmerging Client Records

If you have merged two or more clients that should not have been merged, you will need to unmerge them.

Search for the client and make note of the new imMTrax ID number of the merged record.

**Client Search Criteria**

*Last Name\** soup

*First Name\** tom

*Birth Date\**

Mother's First Name

Mother's Maiden Last

Medical Home Association

SSN  -  -

Phone  -  -

Chart#

imMTrax ID

Organization ID

Find

\* Fields displayed in *italics* are required for adding new patients.

Possible Matches: 2

Index

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Last Name	First Name	Middle Name	imMTrax ID	Birth Date	Chart #	Mother's Maiden First	Mother's Maiden Last	Gender
<a href="#">SOUP</a>	TOMATO		4287872	01/01/2009		POTATO		M
<a href="#">SOUP</a>	TOMATO	ARCHIBALD	4306327	01/01/2009		POTATO		M

# Unmerging Client Records

## Clients

- manage client
- last client
- mass immunization
- nip (nv) validation report
- merge clients
- unmerge clients
- client summary view

Enter Client to Unmerge...

View by Client Id...

\*Client Id

4306327

View

Cancel

Insert the newly merged imMTrax  
ID and select View

# Unmerging Client Records

**Unmerge Clients...**

Unmerge selected clients....

Return to the Previous Screen....

**Unmerge Selected**

**Cancel**

**Select clients to unmerge...**

Client # (Master Client: 4306327)	<input checked="" type="checkbox"/> 4287538	<input checked="" type="checkbox"/> 4306215
<b>Site:</b>	Bridger Internal Medicine	Bridger Internal Medicine
<b>Primary Care Provider:</b>		Not Associated
<b>Medical Home Association:</b>	Unknown	Unknown
<b>SSN:</b>		
<b>Last Name:</b>	SOUP	SMITH
<b>First Name:</b>	TOMATO	JOHN
<b>Middle Name:</b>	ARCHIBALD	
<b>Name Suffix:</b>		
<b>Date of Birth:</b>	01/01/2009	01/01/2008
<b>Birth Certificate #:</b>		
<b>Date of Death:</b>		
<b>Death Certificate #:</b>		
<b>Gender:</b>	MALE	FEMALE
<b>Race:</b>		
<b>Ethnicity:</b>		
<b>Mother's First Name:</b>	POTATO	
<b>Mother's Maiden Name:</b>		
<b>School:</b>		
<b>County:</b>	BIG HORN	UNKNOWN
<b>Contact Allowed:</b>	Yes	Yes
<b>Opt Out:</b>	No	No
<b>Medicaid Active:</b>		
<b>Eligibilities</b>	Not Eligible: Insured	Unknown or Undetermined:

Confirm the records  
should not have  
been merged.

Select *Unmerge  
Selected*

Montana Department of Health  
and Human Services  
Public Health and Safety  
Division  
Immunization Program

# Questions?

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